

## Job Aid: How to Create a Change Order

### This Job Aid shows how to:

- Create a change order in COMMBUYS

### Of Special Note:

A change order is a way of making changes or updating an approved purchase order (including Master Blankets). Change Orders are only allowed after a purchaser order has completed its entire approval path. Only the COMMBUYS “purchaser”, listed on the document, or their BP supervisor and the DA superuser can create a change order. All revisions to the PO are subject to the same approvals. Changes can be made to the items and accounting tabs. **NOTE:** Changes to a purchase order appear on the Summary page.

### Screenshot



The screenshot shows the COMMBUYS website interface. At the top, there is a header with "Welcome To COMMBUYS" and the large COMMBUYS logo. Below the logo, a paragraph states: "COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers." A section titled "COMMBUYS INFORMATION:" provides links for "Training and Registration for Purchasers", "Training and Registration for Sellers", "Job Aids for Purchasers", and "Job Aids for Sellers". Below this, contact information for the COMMBUYS Help Desk is provided, including an email address and phone numbers. A list of links with brief descriptions follows: "Register" (Register here to begin using COMMBUYS. Vendors, please read this disclaimer prior to registering.), "Complete Registration" (Complete registration here to begin using COMMBUYS. Vendors, please read this disclaimer prior to completing registration.), "Open Bids" (Browse open bid opportunities.), "Active Contracts" (Browse active Contracts/Blankets.), "Contract & Bid Search" (Search for Bids and active Contracts/Blankets.), and "Registered Vendor Search" (Search for registered vendors.). At the bottom of the main content area, there is a login box with fields for "Login ID:" and "Password:", a "Login" button, and a link for "Forgot your password?". The footer contains the copyright notice: "© 2014 Periscope Holdings, Inc. All Rights Reserved".

### Directions

1. Launch the COMMBUYS website by entering the URL for [COMMBUYS](https://www.commbuys.com) (<https://www.commbuys.com>) in the browser.

Log in using your Login ID and password.

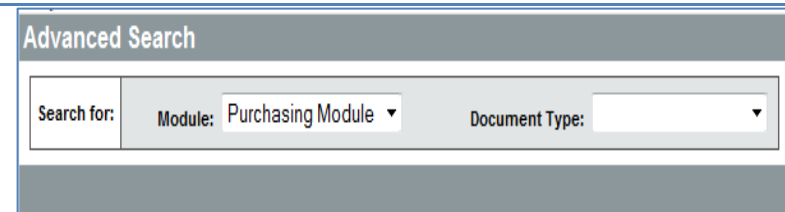
## Job Aid: How to Create a Change Order

### Screenshot

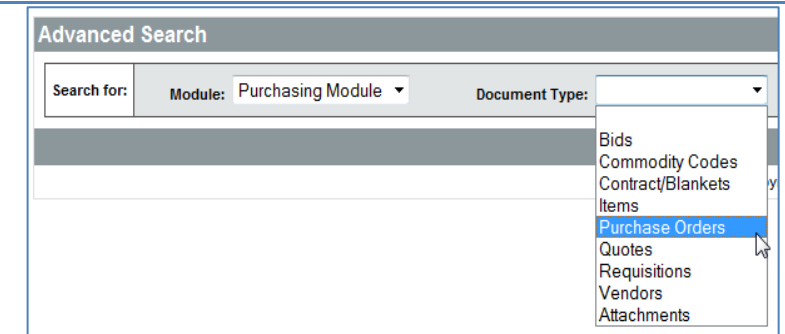
### Directions



2. Upon successful login, select the **Basic Purchasing** role on the upper right side of the page and click the Search icon (magnifying glass).

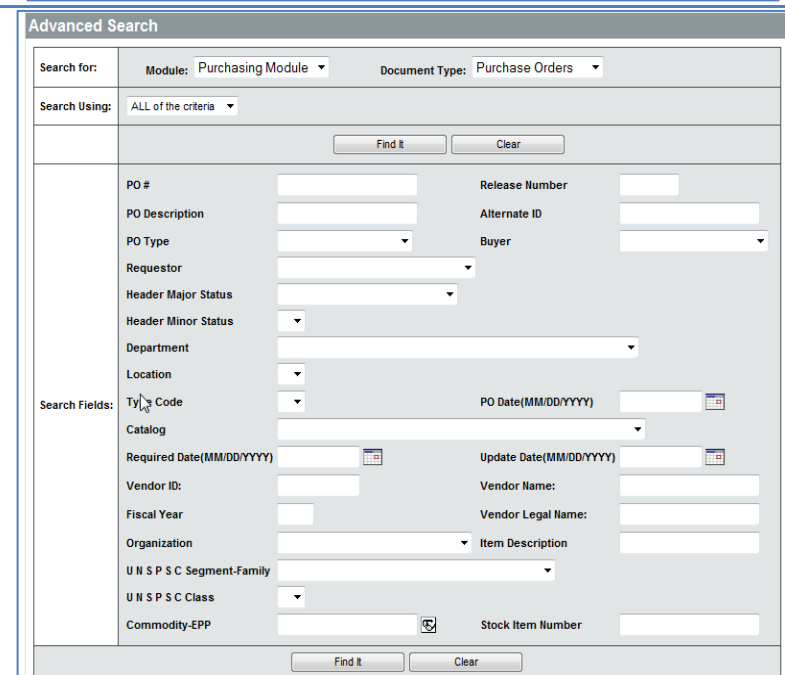


3. The Advanced Search page opens. Use the left dropdown to select the Module: **Purchasing Module**.



4. Use the right dropdown to locate and select the Document Type.

For example, **Purchase Order** for ordinary PO's or **Contract Blankets** for a Master Blanket Purchase Order.



5. Page refreshes to show the Advanced Search criteria box. You can now enter search criteria to locate the purchase order that will require a change order.

Enter search criteria and click **Find It**.

**NOTE:** a purchase order must be in 'Ready to Send' or 'Sent' status before a change order can be created against the purchase order. The status can be selected from the Header Major Status, if you want to filter your results.



OPERATIONAL SERVICES DIVISION

## Job Aid: How to Create a Change Order

### Screenshot

### Directions

6. The search returns a list of purchase orders meeting the search criteria.

Click the blue hyperlinked purchase order # to open the desired document.

7. The purchase order opens to the **Summary** tab.

Click the **Change Orders** tab.

8. The **Change Order** tab displays.

Click the **Create Change Order** button.

Advanced Search ▾

Results

1-25 of 415  
1 2 3 4 5 6 7 8 9 10 > W

Purchase Order #	Purchase Order Date	Description	Organization	Dept/Loc	Purchaser	Vendor Name	Total	Status
<a href="#">C113877-vCurrent</a>	07/18/2006	VEH84	Operational Services Division	OSD01/OSD10	Richard Wolan	<a href="#">Conversion Vendor</a>	\$0.00	3PS - Sent
<a href="#">C114016-vCurrent</a>	07/31/2006	VEH83	Operational Services Division	OSD01/OSD10	Kathleen Reilly	<a href="#">Conversion Vendor</a>	\$0.00	3PS - Sent
<a href="#">PO-12-1080-1080C-1080L-00000001409</a>	05/14/2014	Landscaping Services, Tree Trimming, Catch Basin Cleaning, Snow Removal and Related Services	Operational Services Division	OSD01/OSDEP	Thomas Clayton	<a href="#">Test Vendor6</a>	\$10.00	3PS - Sent
<a href="#">PO-14-1080-1080C-1080L-00000000162</a>	03/20/2014	VEH93	Operational Services Division	OSD01/OSD10	James Ferni	<a href="#">C.N. Wood Co., Inc.</a>	\$0.00	3PS - Sent
<a href="#">PO-14-1080-1080C-1080L-00000000166</a>	03/20/2014	VEH93	Operational Services Division	OSD01/OSD10	James Ferni	<a href="#">McDevitt Trucks, Inc.</a>	\$0.00	3PS - Sent
<a href="#">PO-14-1080-1080C-1080L-00000000169-1</a>	05/07/2014	test	Operational Services Division	OSD01/OSDEP	Paula Marshall	<a href="#">Minuteman Trucks, Inc.</a>	\$203,320.00	3PS - Sent
<a href="#">PO-14-1080-1080C-1080L-00000000175</a>	03/20/2014	VEH93	Operational Services Division	OSD01/OSD10	James Ferni	<a href="#">Northland Industrial Truck Co., Inc.</a>	\$0.00	3PS - Sent
<a href="#">PO-14-1080-1080C-1080L-00000000183</a>	03/20/2014	VEH93	Operational Services Division	OSD01/OSD10	James Ferni	<a href="#">Sunbelt Rentals, Inc. dba Case of New England</a>	\$0.00	3PS - Sent
<a href="#">PO-14-1080-1080C-1080L-00000000186</a>	03/20/2014	VEH93	Operational Services Division	OSD01/OSD10	James Ferni	<a href="#">Taylor &amp; Lloyd, Inc.</a>	\$0.00	3PS - Sent
<a href="#">PO-14-1080-1080C-1080L-00000000186-1</a>	05/07/2014	test	Operational Services Division	OSD01/OSDEP	Paula Marshall	<a href="#">Taylor &amp; Lloyd, Inc.</a>	\$151,170.00	3PS - Sent
<a href="#">PO-14-1080-1080C-1080L-00000000189</a>	03/20/2014	VEH93	Operational Services Division	OSD01/OSD10	James Ferni	<a href="#">Woodco Machinery, Inc.</a>	\$0.00	3PS - Sent
<a href="#">PO-14-1080-1080C-1080L-00000000193</a>	03/23/2014	VEH83	Operational Services Division	OSD01/OSD10	Kathleen Reilly	<a href="#">Pete's Tire Barn</a>	\$0.00	3PS - Sent
<a href="#">PO-14-1080-1080C-1080L-00000001034-1</a>	05/07/2014	Quick Buy Requisition	Operational Services Division	OSD01/OSDEP	Paula Marshall	<a href="#">Keeffe Group</a>	\$630.00	3PS - Sent

Release Purchase Order PO-15-1080-1080C-1080L-00000001476:2 Status: 3PS - Sent

General Items Vendor Address Accounting Routing Attachments Notes Change Orders Reminders **Summary**

**Header Information**

Purchase Order Number: PO-15-1080-1080C-1080L-00000001476	Release Number: 2	Short Description: Test
Status: 3PS - Sent	Purchaser: Buyer Buyer	Receipt Method: Quantity
Fiscal Year: 2015	PO Type: Release	Minor Status:
Organization: Operational Services Division	Location: 1080L - Default Data Conversion Location	Type Code:
Department: 1080CONV - Default Data Conversion Department	Entered Date: 09/11/2014 05:21:20 PM	Control Code:
Alternate ID: RPA12	Retainage %: 0.00%	Print Dest Detail: if Different
Days ARO: 0	Promised Date:	Actual Cost: \$9,240.00
Required By Date:	Tax Rate:	
Board Enabled:		
Contact Instructions: Contact Buyer Buyer at (617)435-0554	Bill-to Address: One Ashburton Place, Room 1017 Boston, MA 02109 US Email: test@openiscope.com	
Invoice Method: Three Way Match		
Print Format: PO Internal		
Ship-to Address: One Ashburton Place, Room 1017 Boston, MA 02109 US Email: test@openiscope.com		

**Attachments**

Agency Files:  
Agency Forms:  
Vendor Files:  
Vendor Forms:

**Vendor Information & PO Terms**

Vendor: 00004196 - TOW/vendor21	Preferred Delivery Method: Email	Shipping Method:
Remit-to Address: George Smith One Main Street Boston, MA 02109 US Email: rochele.walshman@state.ma.us Phone: (617)655-5555 or 3599	Payment Terms:	Freight Terms:
PO Mailing Address: George Smith One Main Street Boston, MA 02109 US Email: rochele.walshman@state.ma.us Phone: (617)655-5555 or 3599	Shipping Terms:	

**PO Acknowledgements:**

Document	Notifications	Acknowledged Date/Time
Purchase Order	Paper Copy Mailed	09/16/2014 09:51:39 AM

**Receipt Information** [Create Receipt](#)

No receipts found for this purchase order.

**Invoice Information**

There are no invoices.

**Item Information**

Print Sequence # 1.0, Item # 1: Test Item 3PS - Sent

U N S P C Code: 45-15-00 LRPJ pieces

Req # / Item #	Req # / Item #	Receipt Method	Qty	Unit Cost	UCM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Freight	Total Cost
1	1	Blanket or Contract # / Line #									
1	1	PO-15-1080-1080C-1080L-00000001476 / 1	Quantity	308.0	\$30.00	EA - Each	0.00		\$0.00	\$0.00	\$9,240.00

Manufacturer: Model: Packaging: Amount: There is no item accounting available for this item.

**Approval Path:**

There are no approval paths found for this purchase order.

[Cancel PO](#) [Print](#) [Print Vendor Copy](#)

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Release Purchase Order PO-15-1080-1080C-1080L-00000001476:2 Status: 3PS - Sent

General Items Vendor Address Accounting Routing Attachments Notes **Change Orders** Reminders Summary

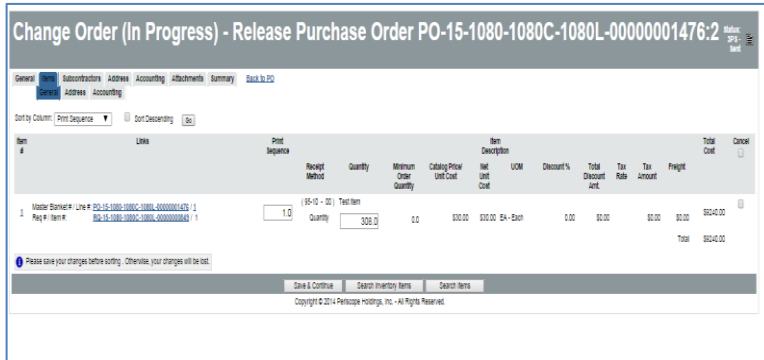
There are no change orders for this document.

[Create Change Order](#)

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### Screenshot

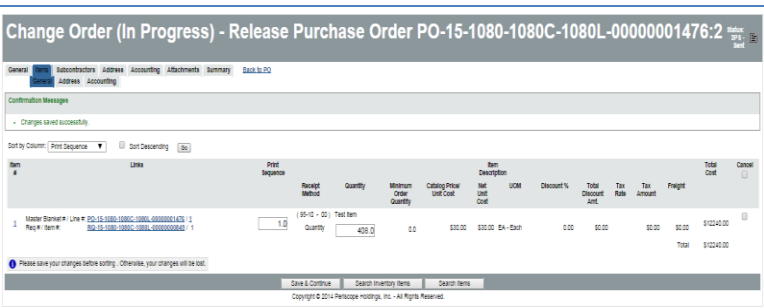


### Directions

9. The Change Order opens to the Items General tab.

**NOTE:** Changes may be made on the following tabs: General, Items, Control, Attachments, Notes and /or Reminders

A change order can include changes to the items, such as quantity, unit cost, description. Other possible changes include changes to the department, purchaser, contact, attachments, etc.

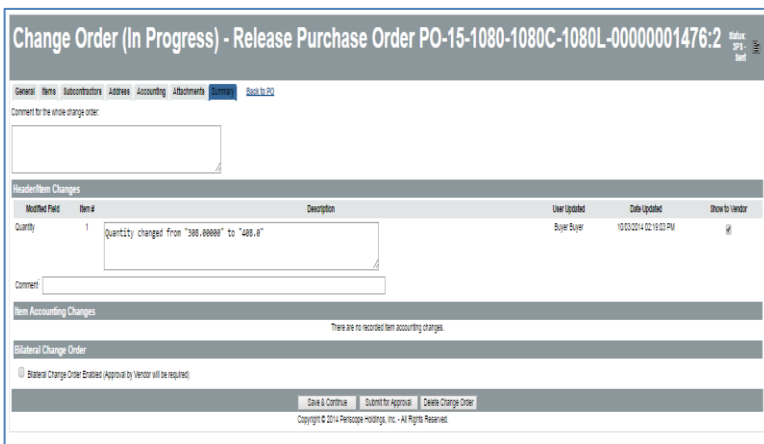


10. Make the changes and click **Save & Continue**. For this purchase order, the quantity was changed from 308 to 408.

To add another item, click the **Search Items** button. Enter the search criteria for the new item(s) and click 'Find It'. When the items search is complete, enter the quantity for the new item and then click the **Add to Order and Exit** button.

Once all changes are complete, click the **Summary** tab.

11. The **Summary** tab provides a recap of the changes made to the purchase order.



The Summary tab displays the modified field and a description of the modification, when modified and by whom.

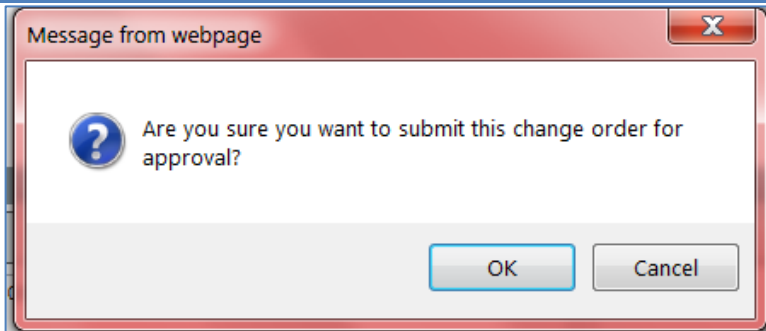
If you would like the Vendor to approve the change order click the **Bilateral Change Order Enabled** at the bottom of the screen.

- To confirm the changes, click **Save & Continue**
- To stop the change, click **Delete Change Order**
- Change Orders require approval. To submit the change for approval, click **Submit for Approval**

## Job Aid: How to Create a Change Order

### Screenshot

### Directions



12. Pop-up message displays, asking for confirmation to submit the change order for approval. Click **OK**.

**Change Order (Ready for Approval) - Release Purchase Order PO-15-1080-1080C-1080L-00000001476:2** Status: SP1 - Init

General Items Subcontractors Address Accounting Attachments **Summary** [Back to PO](#)

**Confirmation Messages**

• Changes saved successfully

Comment for the whole change order:

**Header/Item Changes**

Modified Field	Item #	Description	User Updated	Date Updated	Show to Vendor
Quantity	1	Quantity changed from "525.000000" to "425.0"	Buyer Buyer	10/03/2014 02:35:44 PM	Yes

Comment:

**Item Accounting Changes**

There are no recorded item accounting changes.

**Approval Path**

Order Sequence	Approver	Alternate Approver	Level	Date Requested	Date	Action	Comments
1	Buyer Buyer		1	10/03/2014 02:42 PM			

Add New Order Sequence New Primary Approver

**Approval Actions**

Options: ☒ Approve ☐ Disapprove Change Order

Comment:

[Save & Continue](#)

[Delete Change Order](#)

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13. The Summary tab redisplay confirms the change order is submitted for approval.

**NOTE:** Screen shot is split for viewing ease

To view the Purchase Order, click on the hyperlink **Back to PO**.

**Change Order (Ready to Send) - Release Purchase Order PO-15-1080-1080C-1080L-00000001476:2** Status: SP1 - Init

General Items Subcontractors Address Accounting Attachments **Summary** [Back to PO](#)

Comment for the whole change order:

**Header/Item Changes**

Modified Field	Item #	Description	User Updated	Date Updated	Show to Vendor
Quantity	1	Quantity changed from "525.000000" to "425.0"	Buyer Buyer	10/03/2014 02:35:44 PM	Yes

Comment:

**Item Accounting Changes**

There are no recorded item accounting changes.

**Approval Path**

Order Sequence	Approver	Alternate Approver	Level	Date Requested	Date	Action	Comments
1	Buyer Buyer		1	10/03/2014 02:42 PM	10/03/2014 02:42 PM	Approved (Buyer Buyer)	

After you click 'Apply Change Order', all the changes will be updated in the real document and vendors will be notified if you choose to show some changes to vendor.

[Apply Change Order](#) [Delete Change Order](#)

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14. Just like all other COMMBUYS documents, a change order requires approval. Once the change order has been approved it will be in a **Ready to Send** status.

Open the change order and click **Apply Change Order** at the bottom of the summary tab.

## Job Aid: How to Create a Change Order

### Screenshot

#### Vendor Notification Result

Subject: Change Order Notification - PO #PO-15-1080-1080C-1080L-00000001476:2, Test

#### Email Recipients

Delivery Date: 10/03/2014 02:49:33 PM

Vendor ID	Vendor Name	Email Address
00002196	TOM/Vendor21	Seller Seller (richelle.waterman@state.ma.us)

OK

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### Directions

15. A Vendor Notification Result will appear.

Click **OK** to continue.

#### Release Purchase Order PO-15-1080-1080C-1080L-00000001476:2

status:  
3PS -  
Sent

General Items Vendor Address Accounting Routing Attachments Notes **Change Orders (1)** Reminders Summary

Change Order #	Status	Vendor Change Order Sequence #	Comment	Posted Date	Posted User	Created Date	Created User
1	Sent	1		10/03/2014 02:49:32 PM	Buyer Buyer	10/03/2014 02:16:42 PM	Buyer Buyer

Create Change Order

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16. The change order now displays in a **sent** status on the Release Purchase Order.